

RefWorks Step-By-Step

A. SETTING UP AN ACCOUNT

1. Go to the Gelman RefWorks page- <http://www.gwu.edu/gelman/service/refworks> or click on the RefWorks link in the Aladin Research Portal (under Databases by Title—R).
2. Click on **Set up a New RefWorks Account**.
 - o If you are connecting from off-campus, you will be asked to log-in at this point.
3. Fill out the form, then click on Register.
 1. **Note:** your password should not be your Colonial Mail password. Try to make your password easy to remember, since it can be rather difficult to retrieve if you forget.
4. Congratulations you now have a RefWorks account!
5. You should already be logged in to RefWorks after registering, if not, log in.

B. ADDING REFERENCES TO REFWORKS

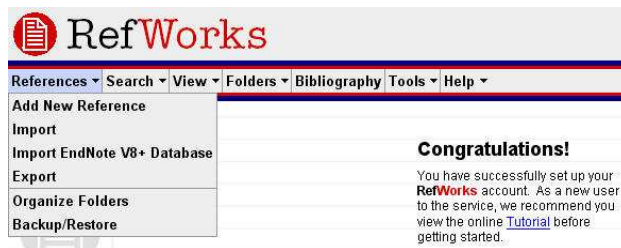
1. Direct Export from Library Databases

Many databases now have a “Direct Export” function, which allows you to get your references from the database to RefWorks with the click of a button. Often, this tool can be found on the “Saved Records” page or the “Export” page.

Note: Two exceptions to this are the Aladin Catalog (see above) and ISI Web of Science (see below).

2. Manually creating a new reference

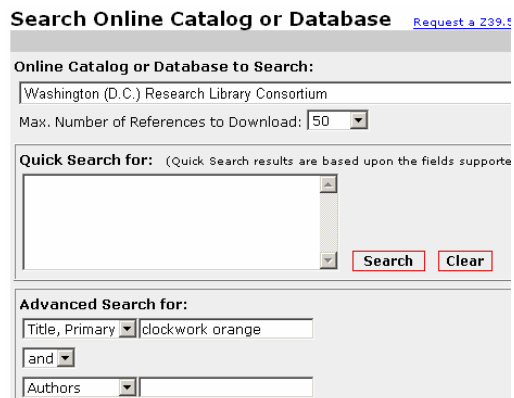
1. Go to the **References** menu.
2. Click on **Add New Reference**.
3. Choose the citation style that you normally use under the **View fields** use by drop down menu. This will show you the required fields for data entry for your particular style.
4. In the **Ref Type** drop down menu, choose the reference type, such as journal article or book chapter, that you will be entering.
5. Enter the information from your reference in the appropriate fields.
6. Click on **Save Reference** at the top of the page.
7. Repeat these steps to add another, or click the **Back to Reference List** link in the upper right-hand corner to return to your list of references.



3. Adding references using RefWork’s search feature

You can use this feature to search an online catalog or free databases, such as the Aladin Catalog or PubMed directly from RefWorks.

1. Click on **Search>Online Catalog or Database** in the top navigation bar.
2. Select **Washington (D.C.) Research Library Consortium** in first drop-down menu.



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3. Enter your search in the **Advanced Search** boxes at the bottom of the menu. You can opt to search by specific fields, such as Title, Author, or Descriptors (subject headings).
4. Click **Search**. A new window will pop up with results from the catalog.. Select the titles that you would like to import by putting a check in the box beside each one.
5. Click **Import**.
6. The selected references will be copied to your RefWorks library. Close the window of search results when you have imported what you need.
7. Click **View Last Imported Folder** to see the references you just imported.

4. Save and Import from Library Databases

While many databases have a Direct Export function, some, Such as ISI Web of Science, do not. If the database that you are using does not have a Direct Export feature, you can save your search results as a text file and manually import them into RefWorks. Each database has a different way to save and export your references.

In RefWorks:

1. Login to your RefWorks account.
2. Go to **References** and click on **Import**.
3. Select the name of **Data Source** and the **Database** from which you are importing references. The Data Source is usually the database platform: e.g., ISI. The Database is the specific name as it might appear in the ALADIN Research Portal: e.g., Web of Science. (If you have any questions about the Data Source and Database, please ask a reference librarian or email Refworks@gelman.gwu.edu).
4. Keep the radio button selected under **Import data from the following Text File**.
5. Select **Browse** to locate the file you saved from your search, then choose **Open**
6. Click the **Import** button.
7. Your references will now be imported into your RefWorks database into the **Last Imported Folder**. You may now move them in the folder of your choice.

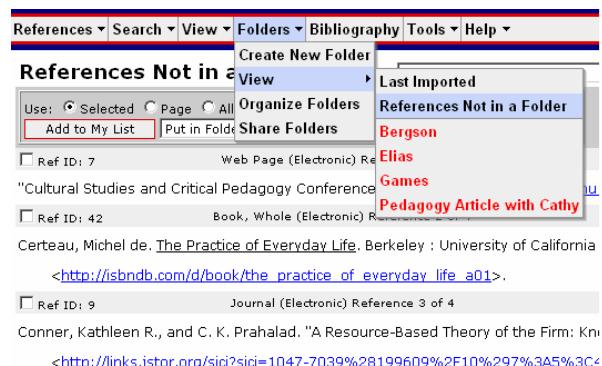
5. Editing References

After importing references, you may find that some of the data necessary for a citation is incomplete or incorrect.

1. In the list of references, click on the **Edit** link on the far right-hand side of the reference you need to edit.
2. Make your changes to any fields you desire.
3. Click **Save Reference** at the top of the screen.
4. Click the **Back to Reference List** link in the upper right-hand corner.

C. USING FOLDERS IN REFWORKS

Using folders in RefWorks can be a handy way to keep research projects separate from each other. References can be in multiple folders. When you import references, they will automatically be placed in a **Last Imported** folder and will stay there until you import more references, at which point they will be group together as **References Not in Folder**.



1. Creating a folder:

1. Click on **Organize Folders** under the **Folders** menu at the top of the screen.
2. Click on **Create New Folder**.
3. Name your folder(s) and click **OK**.

2. Putting references in folders:

1. Go to **Folders>View** menu and click **Last Imported** or **References Not in Folder**.
2. Select those items you'd like to move into a particular folder by checking the box beside each one.
3. From the **Put in Folder** menu, select the appropriate folder.
4. Click **OK** to confirm.

D. SEARCHING AND SORTING YOUR REFERENCES IN REFWORKS

You can search across your RefWorks database or within specific folders for references by author, title, journal, etc. In order to facilitate searching for particular topics within your references, you can add descriptors to a group of references.

1. Adding descriptors to references:

1. Go to the folder you would like to work with.
2. Click on **Global Edit**.
3. Select the appropriate choice from **References to Edit**.
4. Under **Field to Edit**, select which field you want to modify—e.g., **Descriptors**
5. Type in the text you wish to add under **Change Field to**:
6. From **If Field Already Contains Data**, choose whether to replace any text already in that field with your new text, or add your new text onto the end of what's already there.
7. Click **OK**. The text will be added to that field for all the references in that folder, or on that page, or only to those you have selected (depending on your choice in step 3).

2. Searching References:

1. Click on **Search** in the RefWorks toolbar and click **Advanced Search**.
2. Enter in search terms.
3. Select whether you would like to search across your account or in a particular folder.
4. Click **Search**.

3. Searching RefWorks with the Lookup function:

1. You can search for your references in RefWorks by author name, descriptor heading or by periodical title. For example, go to **Search** and then click **Lookup by Periodical**.
2. Browse through the list of periodicals, click on the periodical name you are interested in. You will then

The screenshot shows the RefWorks interface. At the top, there is a navigation bar with menus: References, Search, View, Folders, Bibliography, Tools, and Help. Below this, the 'Lookup' dropdown menu is open, showing options: Advanced, Lookup by Author, Lookup by Descriptor, Lookup by Periodical (highlighted), Online Catalog or Database, and RSS Feed. The main content area displays a list of periodicals with their titles, counts, and edit/delete links. The list includes: Active Learning in Higher Education (1), British Journal of Educational Technology (1), Canadian Journal of Sociology (1), CE (1), Cinema Journal (1), CinJ (1), College English (1), Current Sociology (4), Journal for the Theory of Social Behaviour (1), Kairos: A Journal for Teachers of Writing and Webbed Environments (1), and KairosA (1).

Periodical Title	Count	Edit	Delete
Active Learning in Higher Education	(1)	Edit	Delete
British Journal of Educational Technology	(1)	Edit	Delete
Canadian Journal of Sociology	(1)	Edit	Delete
CE	(1)	Edit	Delete
Cinema Journal	(1)	Edit	Delete
CinJ	(1)	Edit	Delete
College English	(1)	Edit	Delete
Current Sociology	(4)	Edit	Delete
Journal for the Theory of Social Behaviour	(1)	Edit	Delete
Kairos: A Journal for Teachers of Writing and Webbed Environments	(1)	Edit	Delete
KairosA	(1)	Edit	Delete

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see the reference associated with that title.

3. You can also change authors, descriptors, and periodical titles globally by using the Lookup function. Click the **Edit** link next to an item to change the way it appears in all the references to which it pertains—e.g., if an author’s name is misspelled.

4. *Sorting your references by journal name:*

1. Click on **View Folder** and choose a folder.
2. On the far right-hand side of the screen, look under the **Sort by** menu and select **Periodical Full**.

E. APPLYING REFERENCES TO YOUR PAPER

1. *Creating a stand-alone bibliography:*

1. Click the **Bibliography** button from the RefWorks menu bar.
2. Choose an **Output Style** for the references—for example **MLA**. If you do not see the output style you want in this list, select **Access Output Style Manager** to see the full list. Click on the desired style in the window on the left, then click **Add to Favorites**. Click the **Return to Previous Page** link (on the right-hand side), and you should now see your style under the **Output Style** menu.
3. Check **Format a bibliography from a list of References**.
4. From the **File Type to Create** menu choose the appropriate format (e.g., **Word for Windows**).
5. Choose which references you would like to include—**All**, **Selected**, or references **From Folder...**
6. Click **Create Bibliography**. Refworks will tell you when the bibliography has been created.
7. If it doesn’t open automatically in a new window, click **Download It** then **Save** to save the file to your desktop.

2. *Using Write-N-Cite: Download Plug-In*

Write-N-Cite is available for Microsoft Word in Windows (98, ME, NT, 2000, XP) and on Macs (OS 10.3 and above). Further technical specifications are available at:

http://www.RefWorks.com/RefWorks/help/RefWorks.htm#Using_Write-N-Cite.htm .

1. Login to RefWorks.
2. Under the **Tools** menu at the top, click on the **Write-N-Cite** link.
3. Choose the version of Write-N-Cite you wish to install:
 - If you are a Windows user, you can choose between **Write-N-Cite III** and **Write-N-Cite v. 2**. An explanation of the differences can be found under the **Help** menu in RefWorks—search for *Write-N-Cite*. This guide covers Write-N-Cite III.
 - If you are a Mac user, you must install **Write-N-Cite v. 2.5 for Mac**.
4. Click on the appropriate link to download the version you want. Click **Save** if another window appears (to save the program to your desktop).
5. For PC users:
 - Find the RefWorks plug-in on the desktop (**wncinstall.exe** or **wnc3install.exe**) and click on it. Follow the instructions; click the buttons and Write-N-Cite will install itself using the installation wizard.
 - If asked to restart your computer, click **OK**

For Mac users:

- The download should unstuff and the disk image should open automatically. If not, open the file **archive.sitx**, and then open the file **Write-N-Cite 1.0.dmg**.
 - Copy the application into the applications folder.
6. After the installation is complete, open **Microsoft Word** and you will see the red Write-N-Cite button on the tool bar:

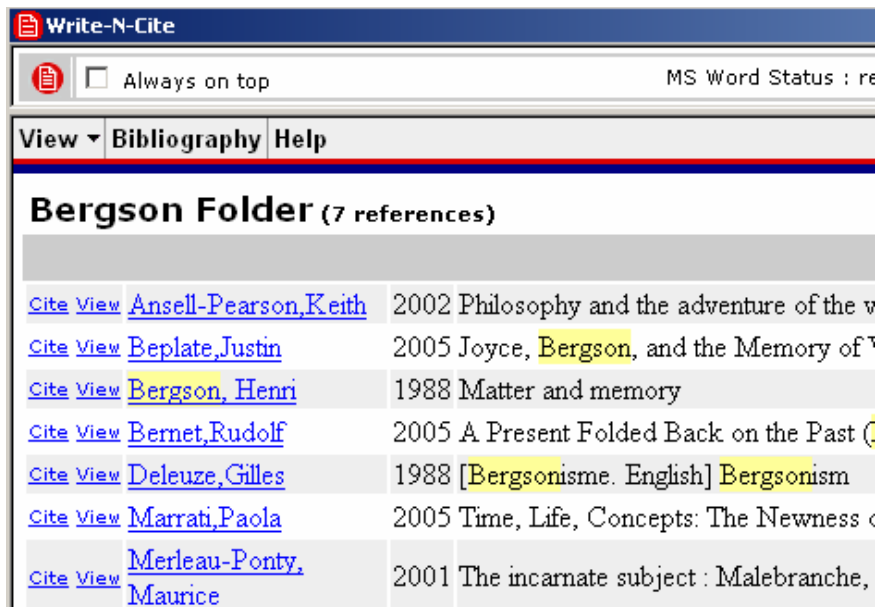


3. Using Write-N-Cite: Adding references

*The following instructions are for WNC III on the PC. For help with Write-N-Cite v. 2 on PC or v. 2.5 on the Mac, consult the **Help** menu available both in RefWorks and in the Write-N-Cite window.*

1. Open Microsoft Word.
2. Start working on you paper.
3. When you get to a point in your paper where you need to enter a parenthetical reference, on your Word document, place the cursor between the last letter of the sentence and the period. Add a space between the two (just as though you were about to enter the parenthetical citation manually).
4. Click on the **Write-N-Cite** icon on the Word toolbar, then login to RefWorks. **Note:** You need to do this even if you are already logged into Refworks from your web browser.
 - **Mac users:** Launch the Write-N-Cite application located in the Applications folder.
5. In the Write-N-Cite window, check **Always on top**. This keeps the **Write-N-Cite** window on top of the Word document.

6. Go to the **View Folder** pull-down menu on the left-hand side and select the RefWorks folder with your references.
7. Choose any reference from your folder and click on the **Cite** link beside it. RefWorks will insert the citation in your document between curly braces: {{5 Ansell-Pearson,Keith 2002; }}
8. Continue writing your paper and using the **Cite** link to add more in-text citations as needed.



9. If you need to add **page numbers** or other text to an in-text citation, position your cursor within the curly braces in Word, then go to the Write-N-Cite window and click the **Edit Citation** link in the upper right-hand corner. A window will open providing a variety of options. Once you have made your changes, click **Save to Word**.

Note: *To add page numbers to parenthetical citations in APA format, you will need to use the **Text After** box, not the **Specific Page** box. To do so, type a **comma**, followed by a **space**, followed by **p.** (or **pp.**), followed by another **space** and then the page number.*

Manipulate Reference	Suppress Authors	Suppress Year	Text Before	Text After	Specific Page	Ref
Up Down Remove	<input type="checkbox"/>	<input type="checkbox"/>		, p. 45		Lacy

Save to Word

*Note: To create footnotes/endnotes, in Word select **Insert–Reference** and select the appropriate type. In the footnote/endnote space, insert the citation from Write-N-Cite as above.*

10. Don't forget to **save your document**.
11. In the Write-N-Cite window, click on **Bibliography**.
12. Under **Output Style**, choose the desired bibliographic style. **If you are using footnotes/endnotes, select the Chicago 15th Notes and Bibliography style.**
13. Click **Create Bibliography**. RefWorks processes your document, formatting your in-text citations and generating the bibliography/works cited list as specified by the selected citation style.
14. **Save** your document.
15. If you need to edit your in-text citations or add additional citations, simply repeat step 13 after doing so, and RefWorks will re-format the document.

*Note: To edit in-text citations, **ALWAYS** use the **Edit Citation** feature in the Write-N-Cite window. If you edit the parenthetical citations manually, when you click **Create Bibliography** the citations will revert back to their original state.*

16. If you need to edit the **full citations** at the end of the document (i.e., the bibliography/works cited entries), you have two options:
 - a. For errors in the **content** of the citation (e.g., wrong author or year, misspelled title, unnecessary URL, etc.), make the change to the actual reference in your **RefWorks account** (NOT in Write-N-Cite). See above in this handout for how to edit entries in RefWorks.
 - b. For **formatting** errors (e.g., RefWorks doesn't capitalize proper nouns in titles in APA format, etc.), first **save a copy of your file** in Word. Then, in the Write-N-Cite window, go to **Tools - Remove Field Codes**. This will create a version of the document that you can edit freely, without interference from RefWorks. (If you want to add more citations, etc., using Write-N-Cite, you will have to go back to the first version.)

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For more help, please feel free to send an email to refworks@gelman.gwu.edu